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ABSTRACT

The leadership role of the Office of Educational Research and Improvement (OERI) in developing a System of Expert Panels to identify and share promising and exemplary products, programs. and practices is discussed. The System of Expert Panels should enable the Federal government to help the public learn about replicable research and development (R&D) products and programs and to help funders and producers of R&D maximize their investments. Such a system should be more than a collection of individual expert panels. It should be led from the inside by a Federal Coordination Unit of experts from Department of Education offices. A middle circle then would connect the individual expert panels in a comprehensive array of topic areas. An outside circle then would represent the consumer-oriented dissemination and evaluation providers. This outer circle would be composed of existing dissemination and evaluation entities such as ERIC and the Regional Educational Laboratories. Principles that guide OERI's role in dissemination are: (1) the Federal role should be facilitative; (2) there should be a combined focus on evaluation and dissemination; (3) the System should help create a deliberate, effective, and continuous approach to finding gaps that merit R&D support; (4) national dissemination efforts should encourage selection and use of the best of educational R&D; (5) participants will increase their commitment to using research, development, and evaluation to improve education; and (6) the System of Expert Panels must adapt to face challenges such as finding financial support. (Contains 25 references.) (SLD)

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An Overview of OERI Efforts to Develop A System to Designate and Disseminate Promising and Exemplary Products, Programs and Practices

Susan Klein

This paper is prepared for the Annual Meeting of the American Educational Research Association in Chicago, IL

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An Overview of OERI Efforts to Develop A System to Designate and Disseminate Promising and Exemplary Products, Programs and Practices

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March 19, 1997

As with many systems under design or even those with an extensive operational history such as the National Diffusion Network, different individuals have different perspectives about what has been or should be done to help find and share the best replicable R&D models with potential users. As researchers we want perspectives to be informed by good analytic insights which include learning from related activities. We also understand the value of consistent sets of principles and assumptions about what is needed and how to accomplish the goals.

This paper describes my views about OERI's leadership role in developing a System of Expert Panels to identify and share promising and exemplary products, programs and practices. My ideas are based on what is covered by the 1994 OERI reauthorization legislation[2] as well as research that I and my colleagues have been doing since the mid 1970s on how federal offices learn about and share the best (Klein, 1993, 1996; Klein & Gwaltney, 1991; LaFollette, 1992). These ideas are also described in an article that should be published in the *Educational Researcher* soon on "A System of Expert Panels and Design Competitions: Complementary Federal Approaches to Find, Develop and Share Promising and Exemplary Products and Programs." This article responds to Bob Slavin's article on "Design Competitions: A Proposal for a New Federal Role in Educational Research and Development for the Jan/ Feb. 1997 *Educational Researcher*.

Background and Purposes: Under its 1994 Reauthorization (Title IX of Goals 2000: Educate America Act), OERI has been given responsibility for:

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[1] This paper is prepared for the Annual Meeting of the American Educational Research Association in Chicago, Symposium 5.26 "Learning from Consumer-Oriented Review Efforts to Designate Promising and Exemplary Products, Programs and Practices" on March 24, 1997. It is based on a longer paper "A System of Expert Panels and Design Competitions: Complementary Federal Approaches to Find, Develop and Share Promising and Exemplary Products and Programs," that has been cleared by the Department of Education for publication in the *Educational Researcher*. This shorter paper and the presentation upon which it is to be based are intended to promote the exchange of ideas among researchers and policy makers. The views are those of the author and no official support by the U.S. Department of Education is intended or should be inferred.

[2] I was fortunate in being able to advise Congressman Major Owens and his Subcommittee staff as they prepared this legislation.

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- developing standards to designate promising and exemplary products, programs and practices. Draft regulations for these standards published June 3, 1996 were revised in response to the public comment and will be published in draft again for additional public comment.

- establishing a system of expert panels to make recommendations on these designations to the Secretary of Education. Two pilot panels in the areas of mathematics and science, and gender equity were appointed in 1996.

- coordinating dissemination activities and programs not just within OERI, but with other parts of the Department, other agencies concerned with education, and with associations and other levels of government, such as state education agencies and local school districts.

The System of Expert Panels should enable the federal government to:
1) help the public learn about the comparative advantages of what exists among the many available replicable R&D-based products, programs, practices and policies[3] based on an understanding of their relative merits[4];

2) help federal and other funders and producers of R&D-based resources maximize their investments by providing support for further evaluation, improvement and dissemination of existing promising and exemplary R&D-based resources and by identifying gaps which may help indicate areas where new products and programs are needed. Other expected benefits include providing practical reasons for educators (and in some cases students) to improve their evaluation skills related to the use of evaluation information in making decisions on instructional tools such as programs or products. Participants in System activities will also be able to contribute to the development of new methods to combine evaluation and dissemination functions to better serve education consumers.

This System is congruent with the Department of Education's strategic plan (1994) to better serve its customers, but it is not limited to reviewing models that have been developed with previous federal funding. It builds on, but differs from, the Joint Dissemination Review Panel

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[3] These replicable R&D-based resources: 1) can be used outside of the original development site, 2) are based on principles from educational research and 3) have some evaluation evidence on their positive impact. In the June 3, 1996 draft standards and in this paper, "program" will often be used to refer to all these R&D-based models or resources. The OERI legislation includes research findings in this list, but instead of having expert panels designate promising or exemplary research studies, syntheses and interpretive papers or informational videos, it is most likely that research findings or principles will be used indirectly by including them in the criteria established by each panel.

[4] Merit is determined by expert panel reviews using criteria under the four categories in the OERI standards for designating promising and exemplary programs. These categories are: evidence of effectiveness/ success, quality, educational significance, and usefulness to others. (See the sidebar.)

and its successor the Program Effectiveness Panel used by the Department's National Diffusion Network (NDN) which is no longer funded.[5]

Structure and Operational Principles:

Structurally this Federally Led Nationwide System Includes More Than Expert Panels. It is important to develop a well understood and articulated nationwide system that has clear connections to other complementary systems, such as the National Education Dissemination System (NEDS) and the even more loosely configured R&D production system. Ideally, this System would be logical, inclusive and dynamic. As explained later, the federal role would be facilitative and collaborative, rather than regulatory. Experience with the development of the Gender Equity Expert panel shows that thinking in new ways is a challenge for many of us on even simple issues such as public acknowledgment about who has submitted what. The community of panel members and their advisers need to decide if they want all submissions to be known publicly and applauded and helped by the community or if they want them to be confidential until positive decisions are made by the Secretary of Education about their promising or exemplary status.

The System of Expert Panels should be more than a collection of individual expert panels. The "Wheel Diagram of the Key Elements of the System of Expert Panels" shows that the System would be led and coordinated from the **inside hub circle** by a Federal Coordination Unit (FCU) of experts from various Department of Education Offices and other agencies involved in education activities to identify and share the best from R&D. This FCU would include agency representatives such as federal staff liaisons with current or potential expert panels.

The **middle circle** connects the individual expert panels (P) in a comprehensive array of topic areas. Aside from the pilot Expert Panel in Mathematics and Science Education, other curriculum areas such as reading may be included. Among others with an equity focus, special education may join the Gender Equity Expert Panel. Other expert panels may focus on topic areas such as school-wide models, safe and drug-free schools, uses of education technology, and teacher education. Where feasible, each topic focused expert panel would have liaisons from federal offices who would be in a position to use money

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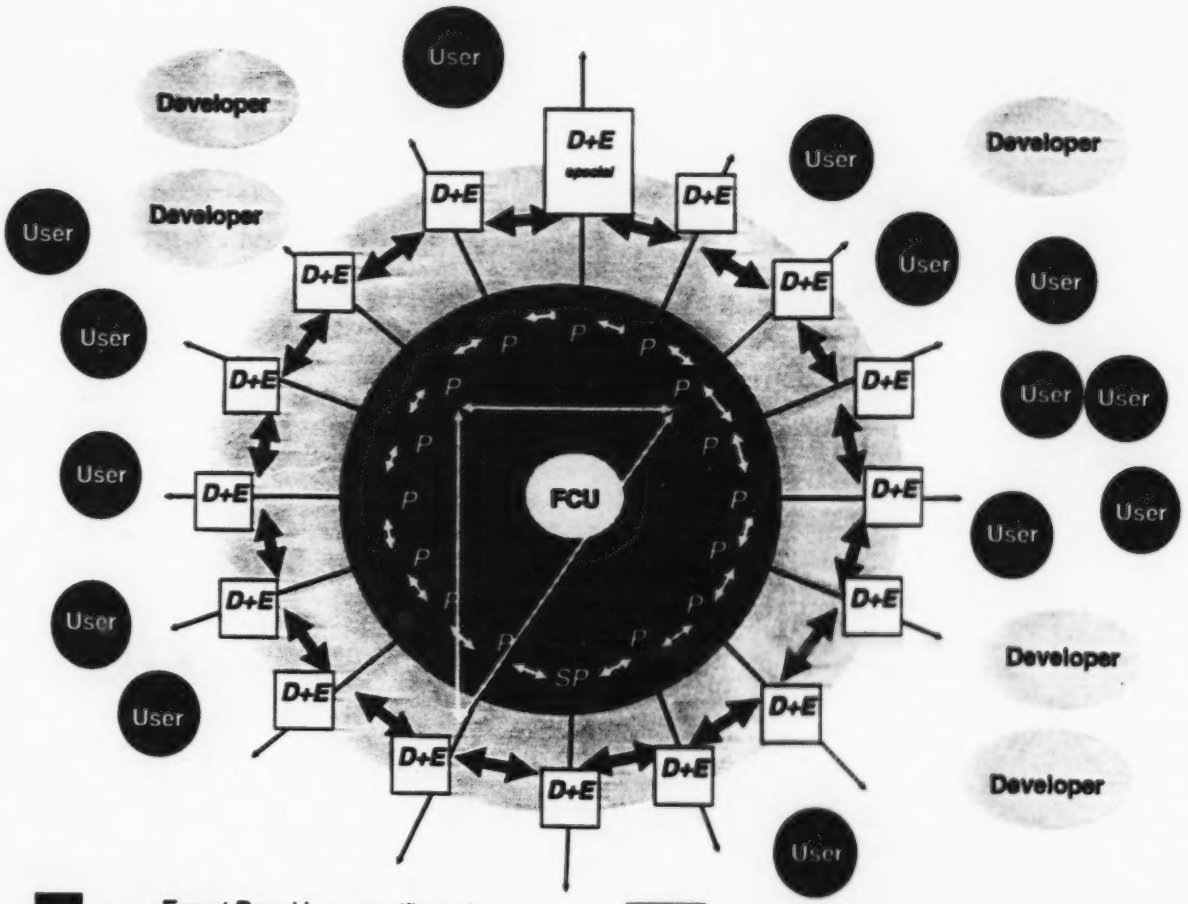
[5] The National Diffusion Network (NDN) established in 1974 and last funded in 1995 provided a systematic procedure to identify and disseminate programs that had evidence of effectiveness. The System of Expert Panels builds on the NDN focus on reviewing submissions to judge effectiveness of replicable programs. But it goes beyond NDN in many ways, such as including three additional criteria categories and the deliberate use of experts, criteria and evidence appropriate for specific topic areas. NDN was a self-contained general purpose review and dissemination system with a review panel, ED funding of many of those approved by the panel as Developers/Demonstrators (to provide implementation assistance to adopters) and State Facilitators (to encourage the use of all approved programs).

Wheel Diagram of the Key Elements of the System of Expert Panels



P =Expert Panel in a specific topic area

SP =Standing Panel

D+E =Dissemination and Evaluation Providers in the National Education Dissemination System

D+E special =Special Dissemination Panels to help all Expert Panels and Evaluation Providers and users and developers of promising and exemplary programs

FCU =Federal Coordinating Unit–OERI, other Education Department offices, and other federal agencies

=Arrows indicate system governance and coordination among D+E providers

=Arrows indicate system governance and coordination among expert panels

=Lines are examples of connections within the System

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and knowledge from their programs to contribute to and build on panel work. These federal liaisons would also advise on the selection of panel members who would be approved by their leaders. This circle also contains a standing panel and a democratic governance and coordination structure for the expert panels who would represent their topic-focused constituency groups.

The **outside circle** represents the consumer-oriented dissemination and evaluation providers (D&E). But, unlike the other parts of the diagram, this outer circle primarily would be composed of existing dissemination and evaluation entities such as ERIC, technical assistance centers, Regional Educational Laboratories, organizations that provide third-party evaluations, National R&D Centers, publishers, participants in design competitions, and organizations managing ED and other related World Wide Web sites. Some of these D&E providers would specialize in specific topic areas and some in multiple topic areas. In some cases, national topic specific dissemination and evaluation organizations would be prime candidates to serve as support contractors for an expert panel in their topic area. For example, the Women's Educational Equity Act (WEEA) Equity Resource Center is the support contractor for the Gender Equity Expert Panel. If needed, new topic specific dissemination and evaluation services could be created to support the work of expert panels in specific topic areas. It is likely that most D&E providers would also have key roles in other aspects of the NEDS and the more loosely configured R&D production system. Like the middle circle, participants in this outer circle would be linked across Panel topics by a governance structure[6] and by joint use of Special D&E Providers. Functions of topic specific and multi-topic Special D&E Providers would include disseminating promising and exemplary programs, obtaining and sharing systematic user feedback, reviews and evaluation reports on promising and exemplary programs in multiple topic areas and sharing information about opportunities to participate in the third-party evaluations of promising programs. In a commissioned paper, Patricia Campbell (1994) described initial ideas on how a D&E provider could obtain, synthesize and share teacher and student evaluation feedback on promising and exemplary programs.

The spokes of the wheel show that much of the coordination of the work and contacts with the users would be organized in relation to each of the topic focused expert panels. However, there would also be many other connections since some dissemination and evaluation structures cover multiple topic areas and since promising and exemplary programs (i.e., gender equity in mathematics, science and technology) may be appropriately disseminated under the auspices of more than one topic area.

Principle 1. The Federal Leadership Role Should be Facilitative. The federal government will play a facilitative leadership, partnership, community building role, more than a regulatory role. This new type of collaborative leadership with the field can be developed by establishing expert

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[6] This governance structure may be part of NEDS or it may be created specifically for D&E providers with ties to the expert panels.

panels in a wide variety of topic or special interest areas and sustained over many years with relatively modest federal investments because the topic-focused constituency groups would volunteer review and other services, much as they do now in reviewing journal articles. In addition to strengthening support for the agency from its concerned constituencies, this approach should help these topic focused communities develop a systematic process to share what works and identify gaps. The current panels are succeeding in this in two different ways. The Gender Equity Expert Panel has created an advisory group of over 100 experts who are willing to help the Expert Panel. And many of the members of the Mathematics and Science Expert Panel are leaders of key constituency groups in their area. This closer connection with constituency groups who have expertise in particular topic areas should also help make agency supported work in the area such as design competitions, and technical assistance activities more relevant to constituent needs.[7]

A facilitative federal coordination function is needed to help all components of the System learn from each other and work in complementary ways where there are natural overlaps in responsibilities. More specifically, it will: 1) provide leadership in coordinating (and where feasible, funding) all components of the Wheel Diagram, 2) develop systematic evaluation and dissemination methodologies and consistent decision rules and definitions for system activities so that the public will understand distinctions between "promising" and "exemplary" programs, and 3) develop incentives to make the System work.

1) *Coordination of components of the Wheel Diagram requires flexibility to take advantage of the interests of various topic focused federal offices and constituency groups.* In doing so, it is assumed that federal programs in and outside of OERI would participate in this System, but that each would have somewhat unique activities to take advantage of their own legislative responsibilities. For example, in mathematics and science education, NSF might be able to support a D&E provider to manage comparative third-party evaluations of promising programs with similar purposes or they might fund a D&E provider to manage a design competition (as suggested by Robert Slavin, 1997) to fill a specific gap in the availability of exemplary replicable programs. ED might be able to support state professional development programs that choose promising and exemplary products and programs recommended by the Mathematics and Science Expert Panel or the Gender Equity Expert Panel.

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[7] Constituency groups as represented by associations often recognize excellence by giving awards to individuals in their field or they help establish standards and credentialling systems which focus on judging the quality of individuals or organizations in meeting standards of the profession. They have established activities to recognize promising and exemplary programs, but often find it difficult to sustain this type of review effort without external support or clear connections to continued evaluation and dissemination efforts. The Department of Education has had similar experiences with a wide range of recognition and review activities.

2) *Development of common evaluation and dissemination methods and definitions has started.* The draft OERI standards for designating promising and exemplary programs have common criteria categories:

- evidence of effectiveness/success (from self and third-party evaluations of performance)
- quality (panels judge this by reviewing program materials, perhaps by observing the program in action. They may use criteria such as: congruency with research, accurate & up-to date content, promotes equity and is free of bias based on race, gender, age, culture, ethnic origin, disability or limited English proficiency,
- educational significance (addresses important educational issues, has advantages over other programs with similar purposes)
- usefulness to others (See Summary of OERI Standards and Criteria).

3) *Development of major System incentives revolves around consequences for receiving designations of promising or exemplary.* One suggestion is to provide funds for improving and evaluating programs that are designated "promising". This support would be geared to helping them qualify for future exemplary designations. Based on this understanding, a promising designation would encourage only cautious adaptation or adoption, during which time the program would undergo careful evaluation. Users would be encouraged to select exemplary rather than promising programs unless no exemplary programs meet their need, or unless they wish to participate in the field testing of promising programs. The key purpose for designating programs as exemplary is to increase the use of what works best. In addition to developing working relationships with specific D&E providers, the Expert Panels would work with others to publicize information on exemplary programs through the World Wide Web, TV and print media to help consumers choose from a variety of particularly worthwhile options.

The active partnership roles for the topic-focused constituency groups will need to build on their strengths, resources and interests. For example, the Gender Equity Expert Panel has formed six subpanels to better connect with specific interest groups and the Mathematics and Science Expert Panel members have many contacts with mathematics and science educators they can tap through state affiliates of their national associations.

Principle 2. There should be a combined focus on evaluation and dissemination which I call Consumer-Oriented Evaluation. This focus should be particularly appealing to educators who know they can do a better job if they are able to choose and use effective tools or instructional programs. This concept focuses on obtaining and disseminating descriptive and evaluative information designed to help consumers make decisions about what products or programs will be best for them. In addition to educators, consumers include the entire public (ranging from policy makers to students) who might be interested in learning about the merit of an education product, program or practice. Since many of these R&D-based tools have similar purposes, they will want to know their comparative merit on a range of criteria that are likely to be important for their own decision-making. The OERI standards categories as described in the sidebar are intended to provide a framework for topic-focused criteria and for research-based criteria selected by experts. Ideally, this System of Expert Panels should use D&E providers to develop

OERI STANDARDS AND CRITERIA FOR EXPERT PANELS TO USE TO DISTINGUISH BETWEEN PROMISING AND EXEMPLARY PROGRAMS--summary based on 2/11/97 draft regulations revised according to public comment and suggestions from the OERI Board at their Jan. 31, 1997 Meeting in Washington, DC. A subsequent version of these draft regulations is to be published in the *Federal Register* in the spring of 1997 for public comment.

A panel may recommend to the Secretary that a program be designated as **promising** if the panel determines that the program is **strong** on each of the four categories of standards (Evidence of Success / Effectiveness, Quality of the program, Educational significance and Usefulness to others). A panel may recommend to the Secretary that a program be designated as **exemplary** if the panel determines that the program is **excellent** on each of the four categories of standards. The decision framework for determinations of **strong** and **excellent** on evidence of success/effectiveness is intended to be the same for all panels. However, on the other three standards categories of quality, significance and usefulness to others, each panel may add to the core criteria and establish its own decision framework for designation as promising and exemplary. It is expected that the panels will require a **strong** judgement on almost all criteria within each of these three categories for a designation as promising and a judgement of excellence on almost all criteria within each of the three categories for a designation as exemplary. For a program to be designated exemplary any weaknesses must be minimal and easily corrected.

(a) Evidence of Effectiveness/ Success.
To be judged **strong** in the category of evidence of effectiveness all of the following criteria must be met. A program must:

- have defensible overall evidence supporting claims of worthwhile performance results (without substantial harmful results) at one or more sites (without failing at a large number of other sites)
- have logical or other evidence of adaptability or transportability to other sites.

The combination of this positive evidence of effectiveness and potential replicability creates a significant probability that the program will eventually be able to provide evidence to support claims of exemplary meritorious results as defined in the following section.

To be judged **excellent** under the category of evidence of success/ effectiveness all of the following criteria must be met by convincing evidence that very important claims of positive results (or performance outcomes) can be:

- reasonably attributed to the program, and
- that evidence to support these claims of worthwhile results was sustained in multiple site replications within the past few years (without failing at a large number of other sites or being accompanied by harmful results).

(b) Quality. The panels will make their judgments about quality by reviewing the program materials and determining the extent to which the program:

(1) is congruent with sound research and practice
(2) incorporates accurate and up-to-date information/content
(3) promotes equity and is free of bias based on race, gender, age, culture, ethnic origin, disability, or limited English proficiency
(4) is appropriate, engaging, and motivating for the intended audiences
(5) contains materials that conform to accepted standards of technical product quality.

(c) Educational Significance. The panels will use their expertise in the area to determine the extent to which the program:

(1) addresses an important education issue, challenge or problem
(2) has advantages over other programs with similar purposes

(d) Usefulness to Others. The panels will make these judgments by using their knowledge of what is valued by educator and student users in determining the extent to which the program:

(1) is reasonable in terms of costs to potential users in relation to expected benefits
(2) is or can be made easily available to potential users
(3) can be readily adopted or easily adapted in new locations
(4) can be used in conjunction with other programs if appropriate

consumer reports[8] for specific topic areas where there are Expert Panels. These consumer reports could be supplemented by descriptions and summary reviews of individual promising and exemplary programs which a potential user could retrieve via a computer/Internet search. Consumers should be able to use either or both of these information sources so they can do their own side-by side comparisons and make informed selection decisions. Based on past experience from Educational Products Information Exchange (EPIE) (Komoski, 1989) and others, it is unlikely that education consumers will want to pay for this information. So it is assumed that the government, foundations and associations will need to pay for D&E providers to do this public domain work. When all System components are operating, the evaluation results that would be included in this consumer information would not end with initial expert panel decisions. The panels and their support contractors would continue to up-date this information based on work of the D&E Providers described in the outside wheel of the System Diagram. For example, a Special D&E Provider would collect information from users of promising and exemplary programs, thus making sure that users play a continual role in helping each other learn what works for whom. It is assumed that this new feedback function and many of the nationwide operations of this System will become increasingly feasible as more educators use computers and Internet to communicate.

Principle 3. This System should help create a deliberate, effective and continuous federal approach to finding and sharing the best and identifying gaps which merit R&D support.
Many federal education programs fund "demonstration" projects which generally allow for the development of a creative program in one site. But when federal funding ends the program may also end in the original site and there are few opportunities to learn if it merits continued support for additional revision, evaluation or dissemination to others. Similarly, federal offices rarely provide this type of additional support for meritorious programs not developed with federal funds. Thus, the System of Expert Panels is intended to carefully identify the gaps and opportunities and may help target subsequent federal funding to replicable programs with the greatest chance of helping students receive a better education and show improved performance. While most Expert Panels will be designed to cover the broad interests of their constituency groups and to last over a number of years, it is also possible for more short-term specific focused expert panels to be established and funded by a federal office or for a broader panel to limit their search for solutions to priority areas during specific time periods (Datta & Scriven, 1997).

Principle 4. National dissemination efforts should find multiple ways to encourage selection and use of the best education R&D has to offer.
This System is not based only on recognition and awards for excellence. Instead it focuses on learning about or developing what is likely to be useful to others. The assumption is that most users will find the funds for implementation especially of exemplary models or designs in late

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[8] *Consumer Reports* from the Consumers Union could be one model. Each report would contain an overview describing the programs and key issues related to their merit, a comparison chart and individual program summaries.

stages of development. If programs are designated as exemplary by the System of Expert Panels the federal government could encourage recipients of Title I or other federal funds to choose from among the exemplary programs or provide technical assistance or other support for their implementation. Incentives could also be provided to collect evaluation evidence on promising and exemplary programs to learn more about how they work in different situations. This evidence could be collected, analyzed and shared by a D&E provider.

Principle 5. All participants will increase their commitment to using research, development and evaluation to learn what works well to inform and foster revision (adaptation) and replication and thus improve education. Many recognize the need to help schools obtain good evidence on the effectiveness of replicable models so they will have justification for choosing among them or sticking with their current practices.

Principle 6. The System of Expert Panels is very ambitious and likely to face challenges such as:

- Obtaining major financial support for individual panels and for related D&E providers.

- The replication of what works focus may also be opposed by educators who believe that replication of model programs and products is not a feasible strategy for educational improvement because of the need for substantial adaptation[9] or because they think educators must develop their own approaches based on their interpretations of research findings and their own insights and experiences.

- Technical and procedural challenges related to deciding on the promising or exemplary status of submissions to the expert panels are substantial. Examples include difficulty in agreeing on desired performance indicators, frequent lack of information on adequacy of implementation as well as performance outcomes, and practical difficulties in making sure that evidence collection and panel submissions will be "the whole truth and nothing but the truth". Although the System is designed to judge the program, not the developer, it is difficult to separate developers from their programs especially when the evaluations are likely to be dependent on the cooperation of the developers and thus they would not be anonymous.

Conclusion:

The other presentations in this session and the experiences of the pilot expert panels should help us learn how to build on the work of others to make this System a basis for the U.S. Department of Education to develop a systematic integrated leadership approach toward working with R&D and practitioner experts in a wide variety of topic areas. The symposium 16.23 tomorrow afternoon on the Gender Equity Expert Panel will show how important it is for experts in R&D

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[9] All involved with the System of Expert Panels agree that adaptation is a fact of life, but that it often helps to start with something that has worked for others.

to work together to learn what works best in their areas of special interest. (I thank both the AERA Special Interest Group: Research Utilization and the AERA Women's Committee and the Special Interest Group: Research on Women in Education for sponsoring these sessions.)

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